CCTO Glossary

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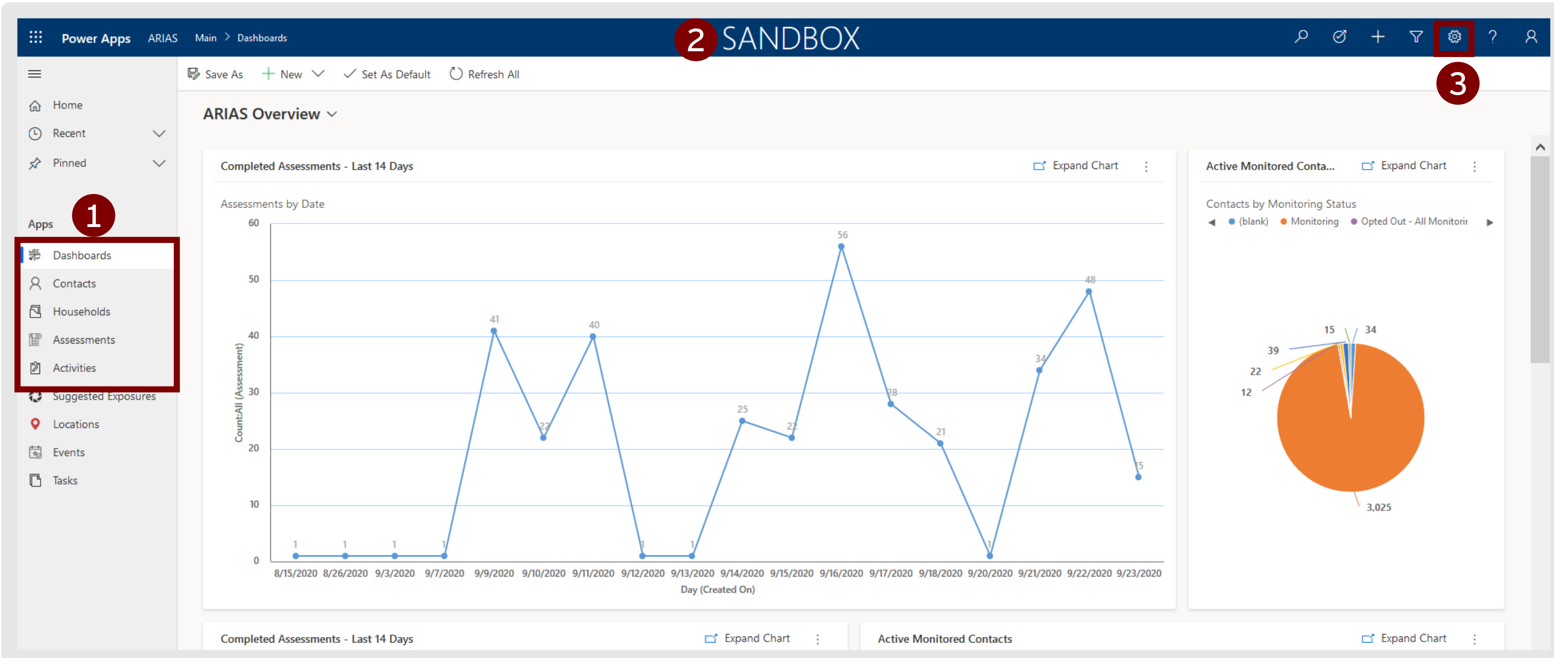
Topics



1. **Navigation Tabs**
   - **Dashboards Tab:** Displays charts and graphs about contacts & assessments within the system.
   - **Contacts Tab:** Displays a list of contacts in the system and allows users to enter new contacts.
   - **Households Tab:** Displays a list of households in the system and allows users to enter new households.
   - **Assessments Tab:** Displays a list of assessments for contacts in the system.
   - **Activities Tab:** Displays a list of activities (which could include phone calls, tasks, or emails) for contacts in the system.
2. **Sandbox Banner:** Displayed at the top of the screen to confirm you are in the practice, or Sandbox, system and can enter practice information. *The live, or production, system is for real contact information only and will not display this banner.*
3. **Settings Gear:** Contains a dropdown menu with *Personalization Settings* (where you can change your time zone and other default settings) and *Advanced Settings*, an area for administrators only.

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Contacts Tab

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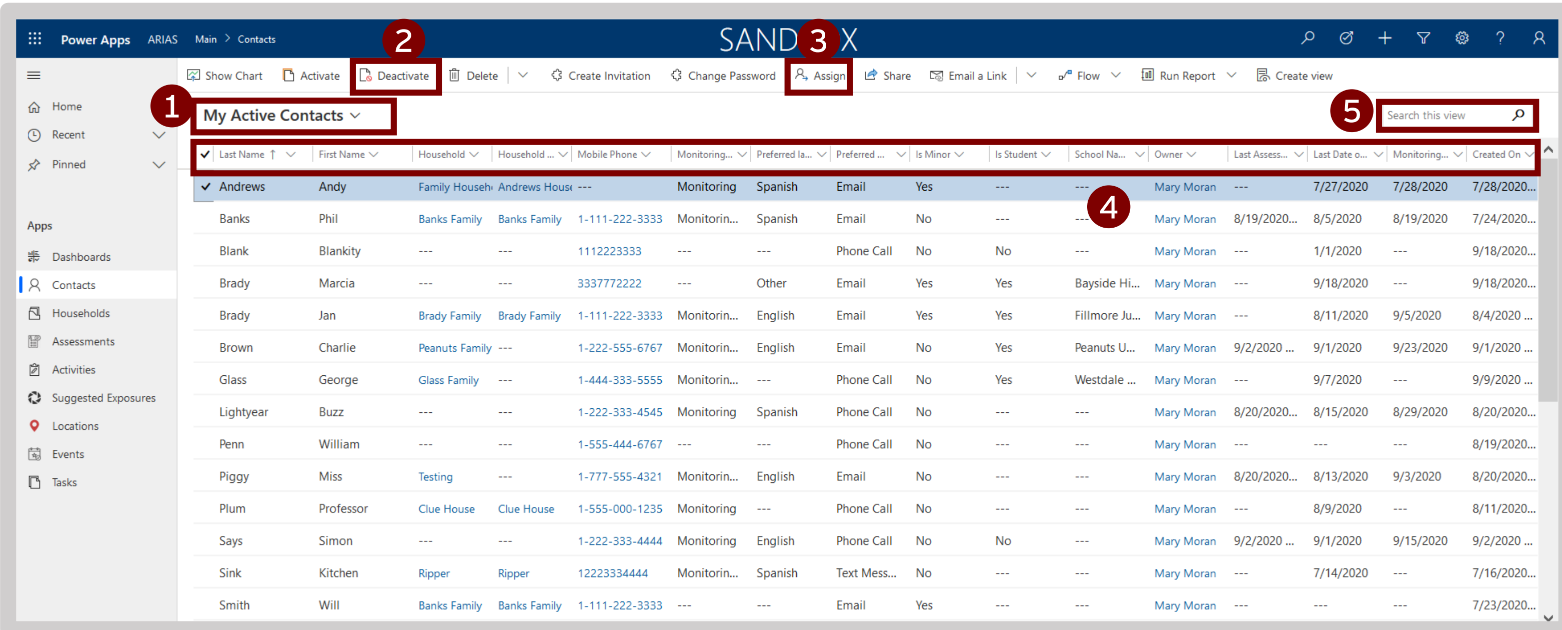

1. **My Active Contacts View**: Default view that displays all of the active contacts assigned to the current user.
2. **Deactivate Button**: Deactivates (but does *not* delete) the selected contact profile. This will put this contact into an inactive status, removing it from the user's "My Active Contacts" view. Contacts should be deactivated after their monitoring period has ended.
3. **Assign Button**: Changes the owner of a contact to a different user or team. This will remove the contact from the first user's "My Active Contacts" view and place it in a different user's "My Active Contacts" view.
4. **Columns**: Categories of information about each entry that can be sorted or filtered by clicking each caret (down arrow). These columns can be changed and customized by creating a custom view per the job aid.
5. **Search**: Used to search within the current view by contact name, C#, address, etc.

Contact Profiles

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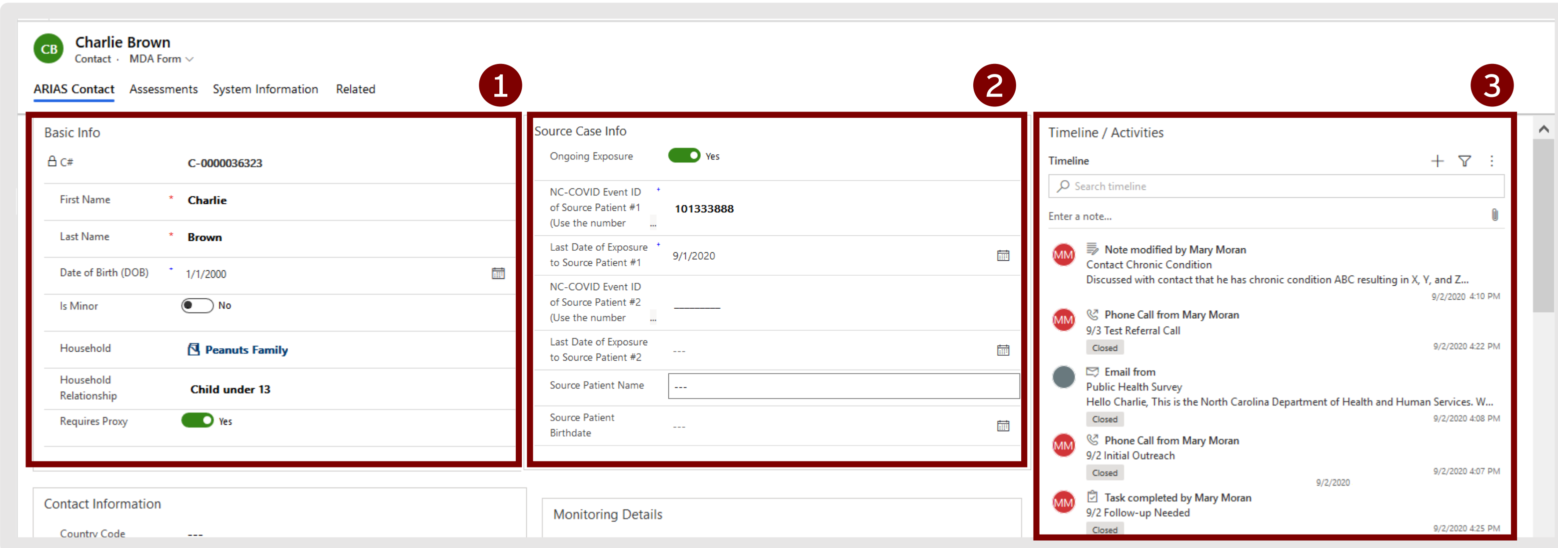


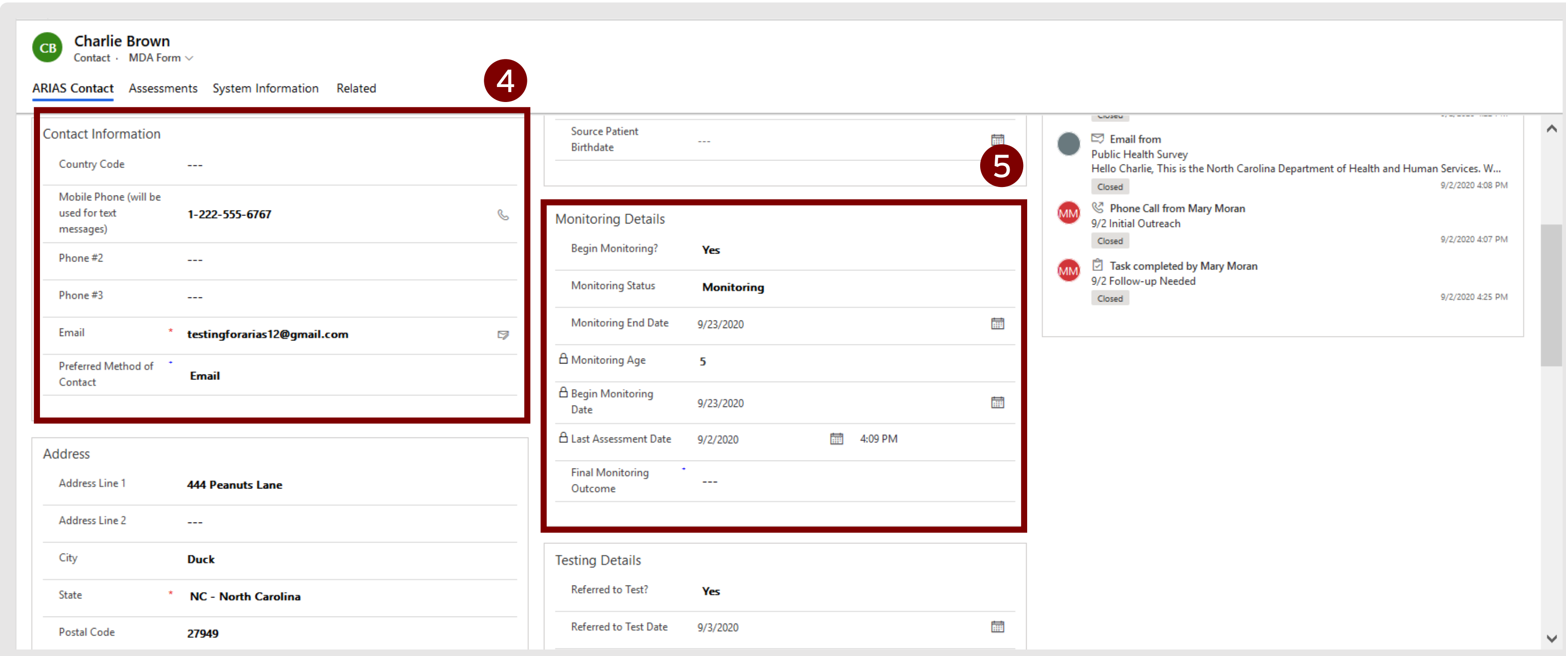
1. Basic Info:

- **C#:** Contact Number, a unique identifier automatically generated by the system.
- **First Name:** First name of the contact. Required to create contact profile.
- **Last Name:** Last name of the contact. Required to create contact profile.
- **Date of Birth:** Contact's exact date of birth, if known. Required to select "Yes" in the "Begin Monitoring?" field, which triggers digital outreach.
- **Is Minor:** Indicates if contact is under age 18.
- **Household:** Used to link a contact with an existing household.
- **Household Relationship:** Used to indicate a contact's relationship to others in their household.
- **Requires Proxy:** Indicates whether a contact completes their own assessments or requires a proxy (e.g., parent completing assessment for minor under 13).

2. Source Case Info:

- **Ongoing Exposure:** Indicates if a contact's last date of exposure is ongoing (e.g., if contact lives with case patient).
- **NC-COVID Event ID of Source Patient:** 9-digit NC-COVID ID of case patient to whom contact was exposed.
- **Last Date of Exposure to Source Patient:** Last date when contact was exposed to case patient.
- **Source Patient Name:** Used only if NC-COVID Event ID is unavailable.
- **Source Patient Birthdate:** Used only if NC-COVID Event ID is unavailable.

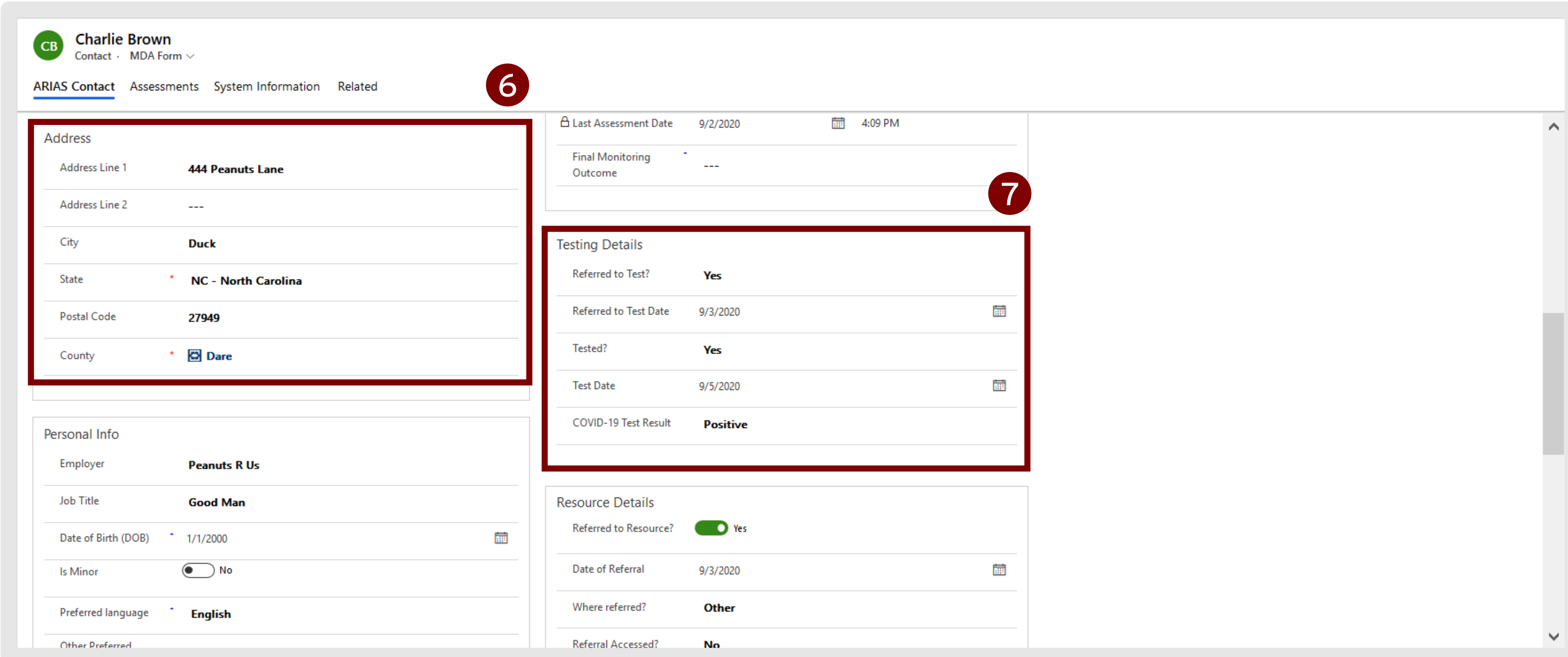
3. **Timeline/Activities:** Used to schedule and record monitoring, outreach, and reference information [per the job aid](#).
   - **Phone Call:** Item that logs or schedules attempted or completed phone calls.
   - **Task:** Item that logs or schedules all other monitoring activities, such as field visits, review of digital assessments, or planned escalations.
   - **Note:** Item that records reference information, such as chronic conditions.



4. **Contact Information:**
   - **Country Code:** Indicates if contact has a non-US country code. Not usually needed.
   - **Mobile Phone:** Contact's **primary phone number**, even if this is not their mobile number. Automated texts will always be sent to this number.
   - **Phone #2, #3:** Contact's secondary phone numbers, such as work or landlines.
   - **Email:** Contact's email address.
   - **Preferred Method of Contact:** Determines how contact will be reached or how automatic digital outreach will be sent.

5. **Monitoring Details:** Used after contact entry when monitoring begins.
   - **Begin Monitoring?:** Turns on automatic digital (text or email) outreach when set to "Yes" (if "Monitoring Status" is set to "Monitoring").
   - **Monitoring Status:** Indicates if contact is being monitored, has opted out, or has concluded or paused monitoring.
   - **Monitoring End Date:** Manual field to input date to conclude monitoring for contact tracer's reference.
   - **Monitoring Age:** Locked field that automatically calculates days since "Begin Monitoring?" was set to "Yes."
   - **Begin Monitoring Date:** Locked field that automatically calculates the date "Begin Monitoring?" was set to "Yes."

- **Last Assessment Date:** Locked field that automatically calculates the date of the last submitted assessment in which the "Agreement" field was completed.
- **Final Monitoring Outcome:** Indicates a contact's status at the conclusion of monitoring. *See job aid for an explanation of outcomes and when they are used.*

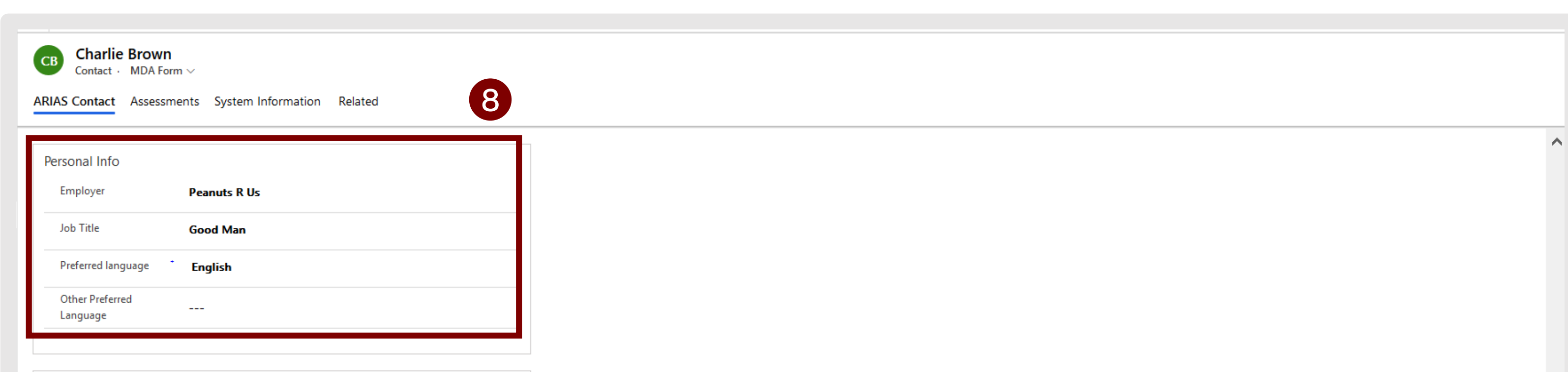


6. Address:

- **Address Line 1, 2:** Contact's street address.
- **City:** City of contact.
- **State:** State of contact. Required to create contact profile.
- **Postal Code:** Postal code of contact.
- **County:** County of contact. Required to create contact profile if the contact resides in NC. *Use county of case if not known.*

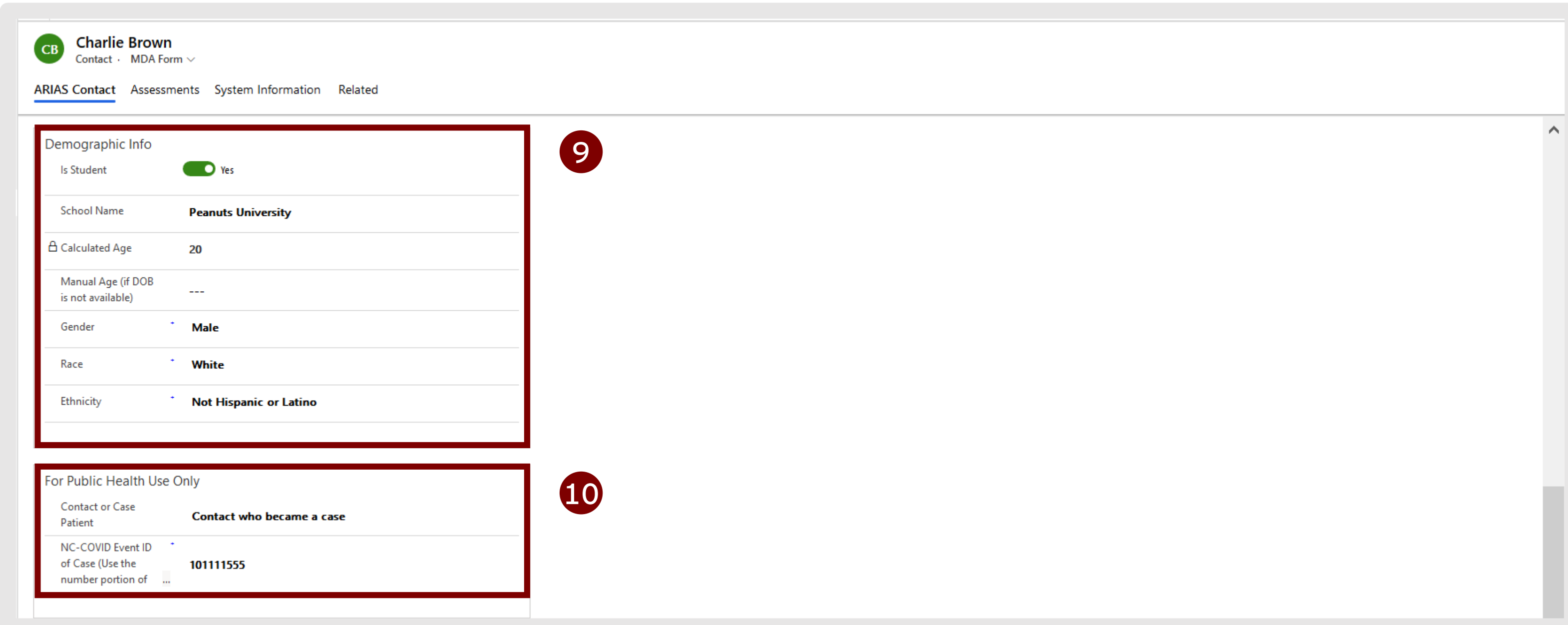
7. Testing Details:

- **Referred to Test?:** Indicates if contact has been referred to testing.
- **Referred to Test Date:** Manual field to indicate date of contact's test referral.
- **Tested?:** Indicates if contact has confirmed to have been tested.
- **Test Date:** Manual field to indicate date of contact's test.
- **COVID-19 Test Result:** Indicates outcome of contact's test.



8. Personal Info

- **Employer:** Contact's employer. Do not use for school information.
- **Job Title:** Contact's job title.
- **Preferred Language:** Contact's primary language. Determines if automatic outreach is sent in English or Spanish.
- **Other Preferred Language:** Used to type the name of contact's primary language only if "Other" is selected in "Preferred Language."

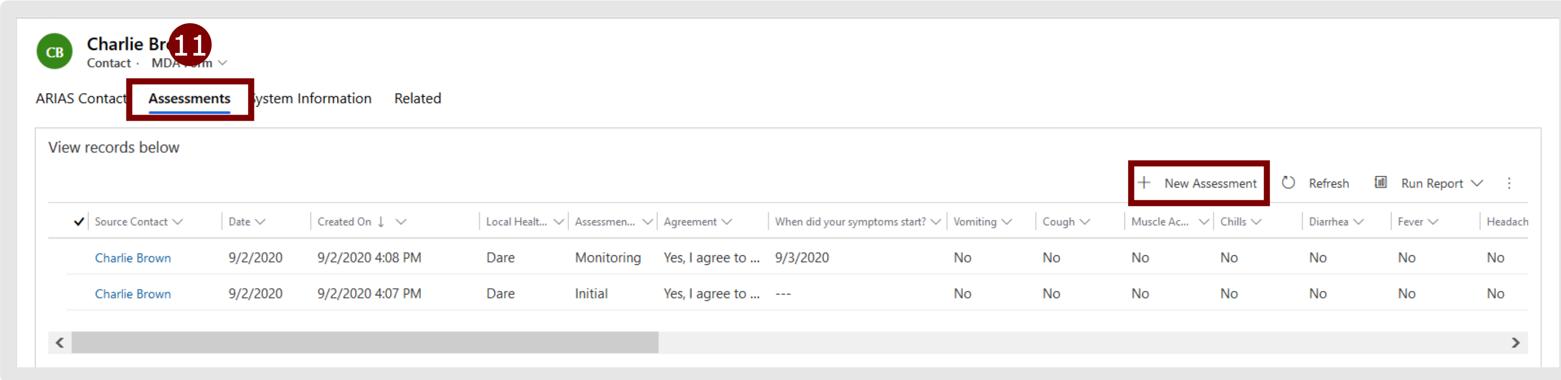


9. Demographic Info:

- **Is Student:** Indicates if contact is a student.
- **School Name:** Contact's school (*or pre-school, daycare, etc. if permitted by local protocol*). Appears if "Is Student" is turned on.
- **Calculated Age:** Locked field that automatically calculates contact's age based on "Date of Birth."
- **Manual Age:** Manual field to input contact's age if DOB is not available.
- **Gender:** Contact's gender.
- **Race:** Contact's race.
- **Ethnicity:** Contact's ethnicity.

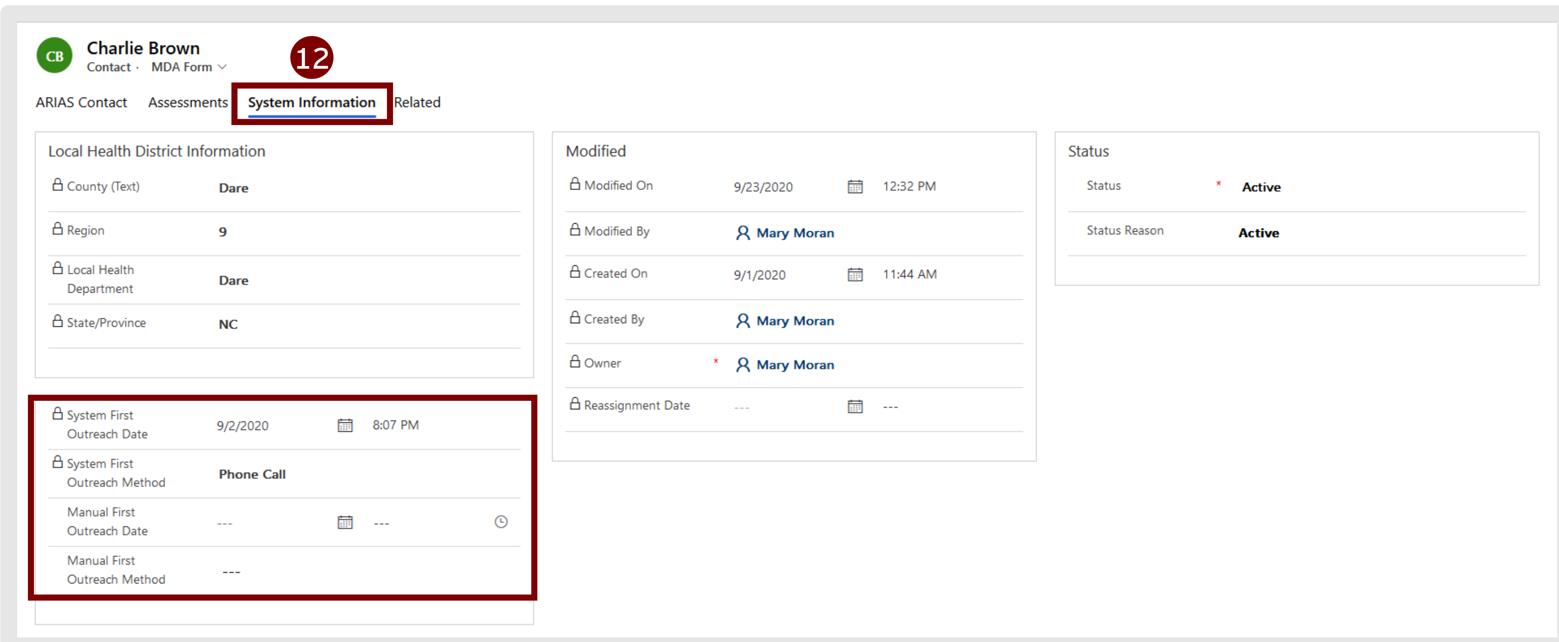
10. For Public Health Use Only:

- **Contact or Case Patient:** Indicates if the individual is a contact, if the individual is a case patient being monitored within CCTO, or if the individual was entered as a contact but became a case patient.
- **NC-COVID Event ID of Case:** Used for the individual's own NC-COVID Event ID if they are (or become) a case.



11. Assessments Page: Displays all assessments (ongoing surveys of changes in symptom and resource needs) for this contact.

- **+New Assessment Button:** Creates a new manual assessment for the contact in which results are recorded by the tracer over the phone.



12. System Information Page: Displays information about the contact profile that has been automatically recorded by the system for your reference.

- **System First Outreach Date, Method:** Locked fields that automatically calculate based on the first completed outreach attempt (phone call, text message, or email) in Timeline/Activities.
- **Manual First Outreach Date, Method:** Manual fields that can be used to record the date and method of first outreach attempt for organizations in which this is required. Not generally used.

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Views

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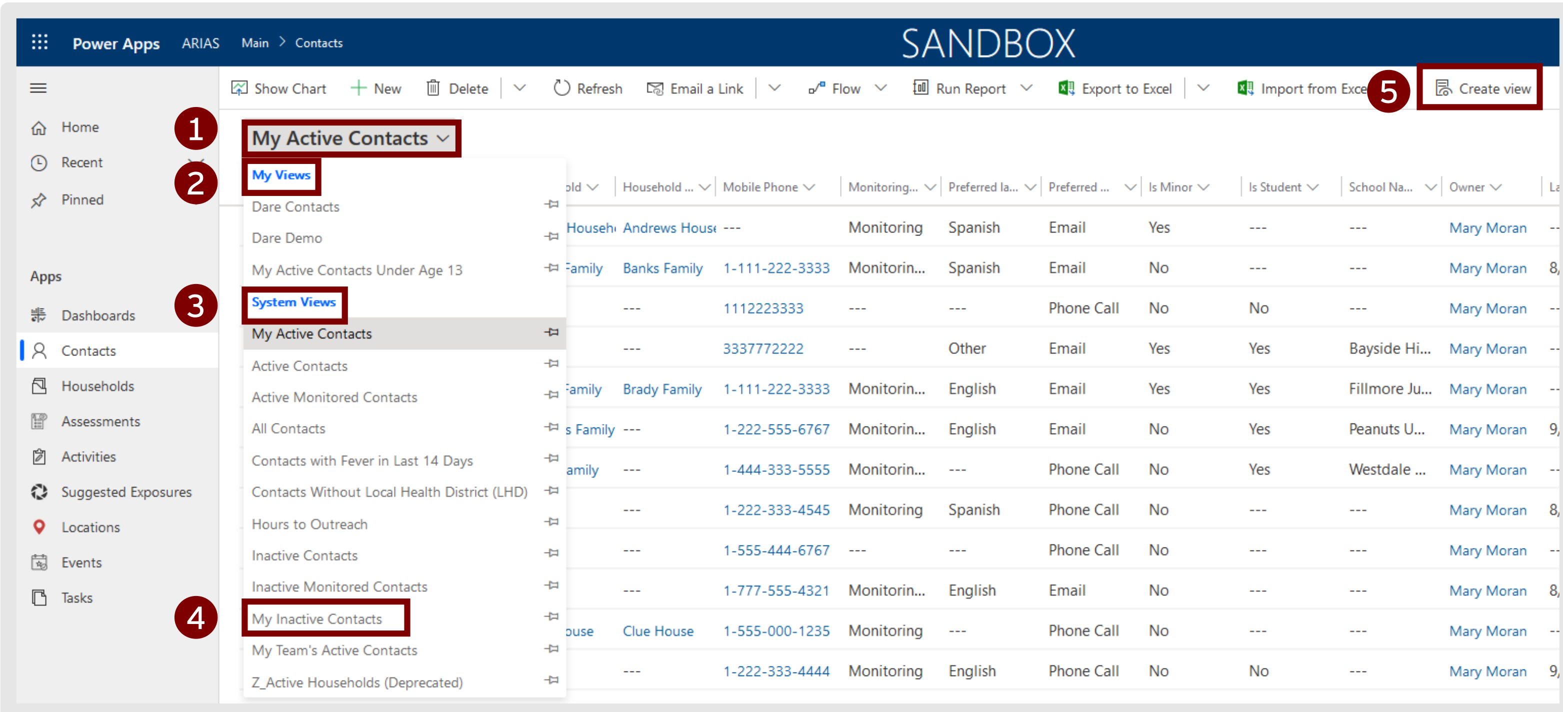

A **view**, such as "My Active Contacts" on the Contacts Tab, is a way of looking at the set of data displayed within each tab. Views use **filters** to limit the entries displayed and **columns** to change the information displayed about those entries. Views can be developed or shared by others, and you can also develop and save your own views.

1. **Views Dropdown:** Displays a list of all views available to the current user. **Views** are options within a tab that change the way information is filtered or displayed. A view may add or remove filters on data (such as a filter for owner or county) or change the type or order of columns displayed.
2. **My Views:** A list of views created by the user ("personal views") and views shared with the user by other users of CCTO.
3. **System Views:** A list of views automatically available to all users of CCTO.
4. **My Inactive Contacts:** A System View that displays a list of all contact profiles owned by the user that have been deactivated.
5. **Create A View Button:** Opens a system dialogue that allows the user to create and share personal views per the job aid.

Household Profiles

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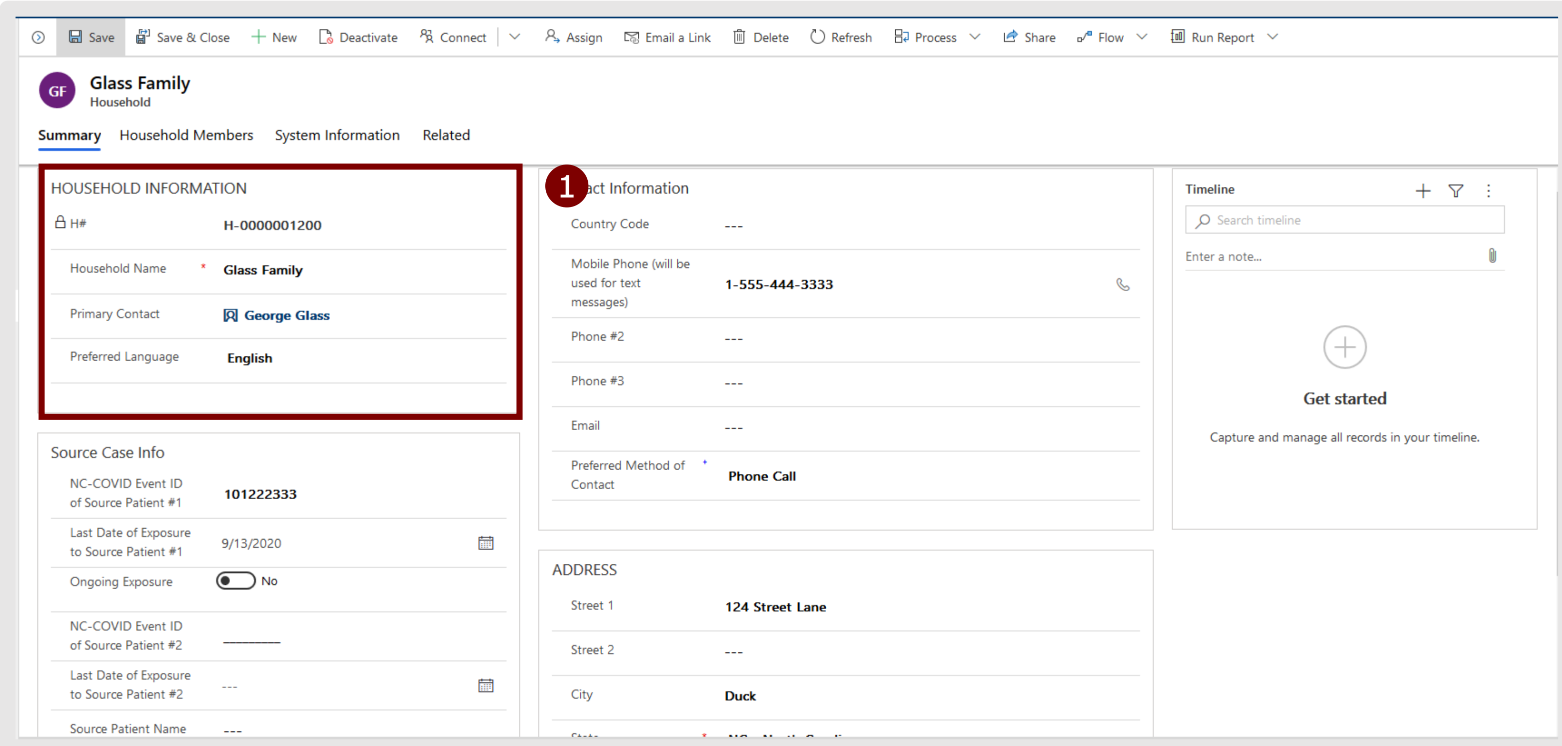
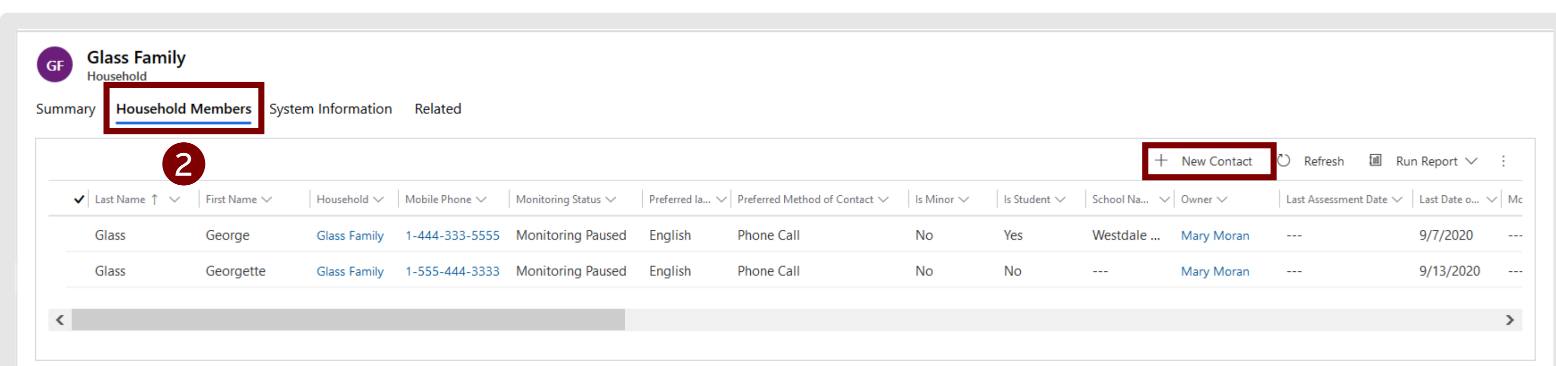


1. **Household Information:** A household is a joint profile that links a group of contacts to help streamline data entry and outreach.
   - **H#:** Household number, a unique identifier automatically generated by the system.
   - **Household Name:** An identifying group name used for the entire household.
   - **Primary Contact:** The main individual to whom the contact tracer should speak when contacting this group. This individual may have been designated to complete assessments on behalf of others.
   - **Preferred Language:** The primary language spoken by members of this household.



2. **Household Members Page:** Lists all contacts within a household.
   - **+New Contact Button:** Creates a new contact within the household using pre-populated information from the household profile.

Assessments

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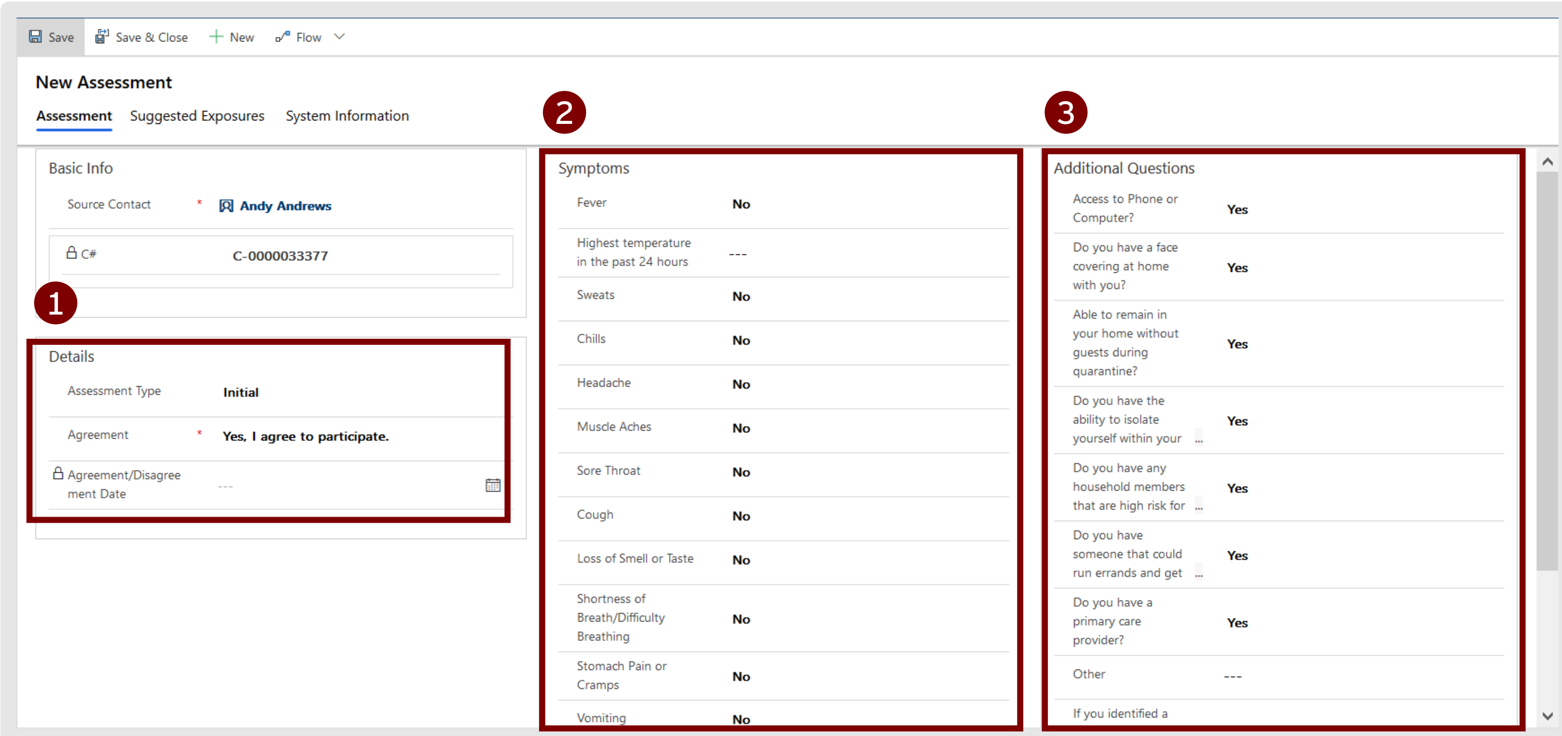

An assessment is an ongoing survey of changes in symptoms and resource needs. These could be completed by the contact in a digital assessment *(delivered to a contact via text or email)* or recorded by the tracer in a manual assessment *(completed by the tracer while speaking to the contact on the phone).*

1. **Details:**
   - **Assessment Type:** Indicates if this is an initial or monitoring assessment.
   - **Agreement:** Indicates whether the contact has agreed to participate and is used to calculate "Last Assessment Date."
   - **Agreement/Disagreement Date:** Locked field that automatically populates based upon the first date that "Agreement" field is populated.
2. **Symptoms:** Corresponds with the symptom questions presented to contacts in digital assessments.
3. **Additional Questions:** Corresponds with the resource need questions presented to contacts in digital assessments.